Contents

1   Executive Summary

This training plan provides a high-level implementation approach for the development of the "Getting It Right: Mistakes We've Found and Learned From" course. The contents of this training plan include:
- An overview of the FSA University training process
- An outline of parameters and assumptions made to date regarding course development, and
- A framework for project management.

Scope
FSA conducts annual audits and program reviews of financial aid offices at colleges and universities participating in the Title IV program. Findings from these reviews include frequently occurring and high liability errors which prevent the efficient processing of student financial aid. According to Training Officers (TOs), these audit and program review findings provide an opportunity to educate FAAs on how to recognize and correct these frequent and costly errors.

Getting It Right will provide one day of classroom-based, instructor-led training which will be delivered in the fall of 2004. The Getting It Right team will review audit findings and prioritize topics to be included in the course. Content scope requires further definition. Content scope and the appropriate level of detail will be specified by the training team following the project kick-off meeting.

Process
The existing FSA University Training Process will be followed to develop this course. This process includes 5 key phases: plan, design, build, deliver, assess and ongoing project management. Project management consists of workplanning, communication planning, reviewing team status reports, and managing the project budget.

Target Audience
The target audience for Getting It Right consists of FAAs from schools who administer Title IV funds. These individuals perform the following roles: business officers, auditors, accounting personnel and system technicians.

Delivery
Delivery methods will include instructor-led classroom-based training and virtual classroom training.

Given that the audience is geographically dispersed, training will be delivered at regional training facilities (RTFs). Depending on cost and/or availability, additional cities may be used to host this course. Additional locations include hotels and school facilities.

Trainers will be selected from a pool of existing FSA training officers (TOs) and Client Account Managers (CAMs). In the event that additional trainers are required, non-federal trainers will be identified.

Logistics planning and support will be necessary throughout all phases of training development and delivery. This includes securing sites, equipment, and materials; registering participants; and shipping and mailing training materials to the training site.

Evaluation
The effectiveness of the course will be evaluated throughout development and delivery to ensure that learning objectives are met.

2 Scope

2.1 Target Audience

The target audience for Getting It Right consists of FAAs from schools who administer Title IV funds and who are located across a geographically dispersed area. Specifically, this audience includes FAAs performing the following roles at university financial aid offices: business officers, auditors, accounting personnel and system technicians.

Typically FSA conducts a total of 55 training sessions across the United States. Each session is usually limited to 60 participants. Attendance data from Spring Training 2004 and Cash Management 2003 will be used to further estimate attendance and audience demographics and determine session offerings for Getting It Right.

2.2 Scope

FSA conducts annual audits and program reviews of financial aid offices at colleges and universities participating in the Title IV program. Findings from these reviews include frequently occurring and high liability errors which prevent the efficient processing of student financial aid. According to Training Officers (TOs), these audit and program review findings provide an opportunity to educate FAAs on how to recognize and correct these frequent and costly errors.

The initial design for Getting It Right consists of one day of classroom-based, instructor-led training which will be delivered in the fall of 2004. To understand issues, FSA has compiled a list of the most frequent, costly and critical program and audit review findings. This resource will serve as a starting point for defining course content. The Getting It Right team will review findings and prioritize topics to be included in the course. This list is attached to deliverable 129.1.4 (Filename: Getting It Right_Audit Review Findings_09-19-2003.doc).

Content scope requires further definition. Content scope and the appropriate level of detail will be specified by the training team following the project kick-off meeting.

2.3 Learning Objectives

Learning objectives define what participants will be able to know or do at the end of a course. Detailed learning objectives will further define content scope and will drive the design and development of course materials. At the end of training delivery, the course evaluation will measure the effectiveness of the training against the original learning objectives.

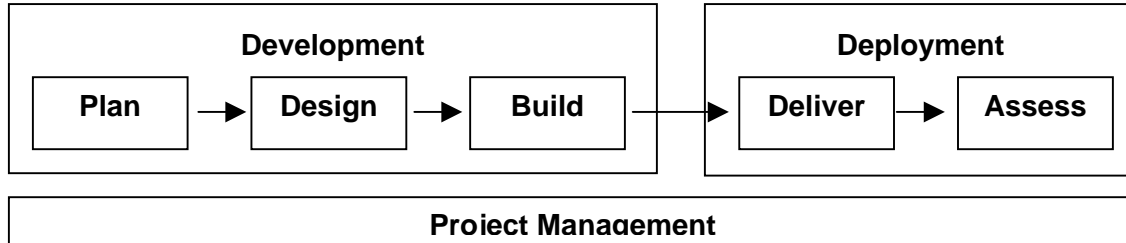High-level learning objectives for Getting It Right are listed below.
- Recognize common errors schools make in administering the Title IV programs; recognize common program review and audit findings
- Analyze current policies and procedures in their own offices to determine possible trouble spots
- Determine corrective actions to take to bring policies and procedures into compliance
- Share information with staff and administration at institution to explain reasons for corrective actions
- Discover and use resources that are available to stay well informed about Title IV program requirements
- Participants will provide input to FSA staff on additional resources needed to improve program integrity

Detailed learning objectives require further definition following project kickoff.

2.4   FSA University Training Process

The existing FSA University Training Process will be followed to develop Getting It Right. The process lifecycle consists of 5 key phases supported by ongoing project management. A soft copy of the process materials can be obtained from Pennie Summers.

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│                Development                   │   │            Deployment               │
│  ┌────────┐   ┌────────┐   ┌────────┐        │   │  ┌────────┐   ┌────────┐            │
│  │  Plan  │ → │ Design │ → │ Build  │        │ → │  │ Deliver│ → │ Assess │            │
│  └────────┘   └────────┘   └────────┘        │   │  └────────┘   └────────┘            │
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│                                Project Management                                       │
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Development

Plan

During the planning phase, the project team outlines the requirements for course development and delivery. The purpose is to set a realistic timeframe for the completion of the project, establish milestones for course development, and anticipate future needs. The Project Manager is responsible for planning and determines high-level course scope, defines a team structure, sets project benchmarks, and builds a communication plan to keep stakeholders and sponsors informed of progress. In addition, the Project Manager is responsible for facilitating the project kickoff meeting.

Design

During the design phase, the Getting It Right team will develop course outlines and begin designing content and delivery mechanisms for the course. This phase is critical because it allows review and revision of proposed materials by subject matter experts, sponsors and other key stakeholders. The train-the-trainer (TOT) course outlines, instructor guides, participant guides, and course activities will need to be designed. The content development team will use storyboards as the primary vehicle for depicting and organizing the course outline and instructional strategies. The content of the course will be reviewed and approved by stakeholders and sponsors. In addition, the team will create an outline for the evaluation strategy of course materials.

Build

The content development team develops all course materials during the build phase. This includes detailed course content, instructor guides, participant materials, and training of trainers course materials. During this phase, a dry run of the course is conducted to ensure that course materials flow, utilize appropriate instructional strategies, and are at the appropriate level of detail for the audience.

Deployment

Deliver

The delivery phase will include the facilitation of a pilot session, a TOT course, and the final delivery of Getting It Right sessions. The pilot sessions are specially designed to solicit feedback from a sample audience and to evaluate the effectiveness of the instructional strategies. Feedback is used to refine the final product. Following the pilot, training of trainer sessions will be held to prepare trainers for course delivery. During implementation, courses are delivered to FAAs in designated locations.

Assess

Training will be reviewed throughout development to ensure accuracy, content appropriateness, and continuing sponsorship of materials.

Project Management

Project management involves the development and ongoing implementation of a workplan and a communication plan. Project management is described in detail in section 4.0 of this document.

3 Training Development and Delivery

3.1 Delivery Strategy

Getting It Right will be delivered to participants via instructor-led classroom-based training. According to the Training Needs Assessment Survey this is the preferred training method of the target audience.

Given that the audience is geographically dispersed, training will most likely be delivered at regional training facilities (RTFs) in the following cities:

- Atlanta
- Boston
- Chicago
- Dallas
- Denver
- Kansas City
- New York
- Philadelphia
- San Francisco
- Seattle.

Typically, depending on cost and/or availability, additional cities are used to host this course and locations include a combination of hotels and schools. Attendance data from Spring Training 2004 and Cash Management 2003 will be used to determine further training locations.

Trainers will be selected from a pool of existing FSA training officers (TOs) and Client Account Managers (CAMs). In the event that additional trainers are required, then non-federal trainers will be identified.

3.2 Instructional Strategy

The instructional strategy is a method for presenting content. It is important to select the appropriate instructional strategy so that content is easily understood and mastered by participants. For Getting It Right, the following factors will influence the selected instructional strategies:

- Needs/type of audience
- Preferred instructional strategies
- Availability of technology
- Type of content being taught
- Cost.

3.3 Logistics Strategy

Logistics planning and support is necessary throughout all phases of training development and delivery to ensure timely and seamless implementation of the course. Logistics planning includes securing sites, equipment, and materials; registering participants; and shipping and mailing training materials to the training site. The Learning Management System will be used to register participants to the course.

3.4 Evaluation Strategy

The effectiveness of the course will be evaluated throughout development and delivery to ensure that learning objectives are met. Evaluation tools include a pilot course to test training modules and course evaluations to gather feedback on training sessions. Feedback from pilot sessions will be used to evaluate whether course modules are the appropriate length and convey ample detail. FSA University uses a standard course evaluation to gather feedback on all training events. This standard evaluation will be supplemented to obtain specific feedback on Getting It Right course content. Data from these evaluations will need to be compiled and synthesized into a final report that will be reviewed by Project Sponsors.

4   Project Management

4.1   Roles and Responsibilities

Establishing roles and responsibilities provides team members with an understanding of what is expected of them and helps the Project Manager select team members who best fit the required roles.   During the project kickoff meeting, the Project Manager will assign roles and responsibilities to team members. The table below provides a high-level framework for structuring the Getting It Right team.

This model is based on the Role Map used for the Spring Training 2004 team and consists of 4 sub-teams: Leadership, Content Development, Support and Delivery. The Leadership Team is responsible for setting direction, overseeing progress of course development and delivery, and coordinating the efforts of the other three teams. The Content Development Team will design and build course materials. The Support Team is responsible for managing the task order award and coordinating logistics and communications. The Delivery Team will provide training. A detailed example of the Spring Training 2004 Role Map is included with this deliverable (Filename: Spring Training 2004_Role Map_09192003.doc).

	Role	Responsibilities	Who/How Many
Leadership Team	Project Sponsor	• Sets strategic direction	TBD
	Project Manager/Team Lead	• Oversees project and monitor work • Sets strategic direction for content development team	TBD
Content Development Team	Lead Instructional Designer	• Translates teams vision, objectives, ideas into draft course material	TBD
	Development Subject Matter Expert (SME)	• Provides content to project team	TBD
	Development Team	• Plans, designs, builds the training course	TBD
	Training Officers	• Assists in delivering and assessing the trainer/training materials and help/support processes	TBD
Support Team	COR	• Executes and monitors task order	TBD
	Communications & Logistics Coordinator	• Plans and executes logistics	TBD
Delivery Team	Trainers	• Delivers training	TBD (Federal and Non-Federal)
	Review SMEs	• Reviews materials and provide input throughout development of course	TBD
	Pilot Audience	• Participates in pilot tests	TBD

4.2 Workplan

Workplanning outlines the scope of an effort and communicates expectations of deadlines with sponsors and team members. A workplan for Getting It Right will assist the training team in successfully developing this course. The Project Manager will monitor the workplan which will be adjusted as necessary to accommodate changes in direction and unforeseen developments.

Suggested high-level milestones for the development of Getting It Right Spring Training 2004 include:

Milestone	Timing
Kickoff Meeting	TBD (Spring 2004)
Course Development	TBD (Summer 2004)
Pilot	TBD (Summer 2004)
Training of Trainers	TBD (Summer 2004)
Course Delivery	TBD (Fall 2004)
Final Summary Report	TBD (Winter 2004)

4.3 Communication Plan

Communication planning is a process that ensures key messages are effectively conveyed to appropriate audiences. Two communication plans are recommended to be developed to serve the internal and external communication needs of this project. The Project Manager will oversee the development of these plans and will ensure they are executed in a timely manner.

An internal communications plan will keep all stakeholders informed of the progress of Getting It Right. Vehicles for this plan will include meetings, conference calls, status reports, presentations, and other methods commonly used by FSA.

An external communication plan will advertise Getting It Right to FAAs via listserv announcements, postings to the FSA learning management system, and postings to the Training for Financial Aid Professionals (TFAP) website.

4.4 Status Reporting

Status reports are recommended for use by the Project Manager to track activities and progress against the team workplan. It also provides the opportunity for team members to identify risks and issues. Additionally, status reporting serves as a communication tool to share updates with sponsors and stakeholders.

The existing FSA University template is available for use by the team to provide status. Each team lead will be responsible for preparing a weekly report which will be reviewed by the project manager and used to communicate progress and issues to project leadership. This template can be obtained from Pennie Summers.

4.5 Project budget

Assuming contractor assistance, responsibility for managing the Getting It Right budget will be shared between the Project Manager and Contracting Officers Representative (COR). The COR will monitor the execution of the task order, collect and analyze actual training cost data, and regularly report budget status and issues to the Project Manager. Together, the Project Manager and the COR will monitor expenditures against the proposed budget and will determine the budgetary implications of course design decisions to the Project Sponsor and team. All expenditures made by the Getting It Right team will require pre-approval by the Project Manager.